

PeopleAdmin HR – Management Guide for Recruitments

This document is intended to assist approving authorities (Managers, VPs, Deans, HR) in managing recruitments through the entire process; from creating the posting to recommending a candidate for hire. Unlike Guest Users, who only have permission to view applications, approving authorities have permission to manage both applicant statuses (workflow states) and posting workflows. Refer to the Chair Checklist for more details on the overall recruitment process.

If you are starting a **PT Instructor recruitment**, please also refer to the *Managing Part-Time Instructor Pools* help document for specifics on managing these pools as they follow a different pattern than regular one-time recruitments and require ongoing “maintenance.”

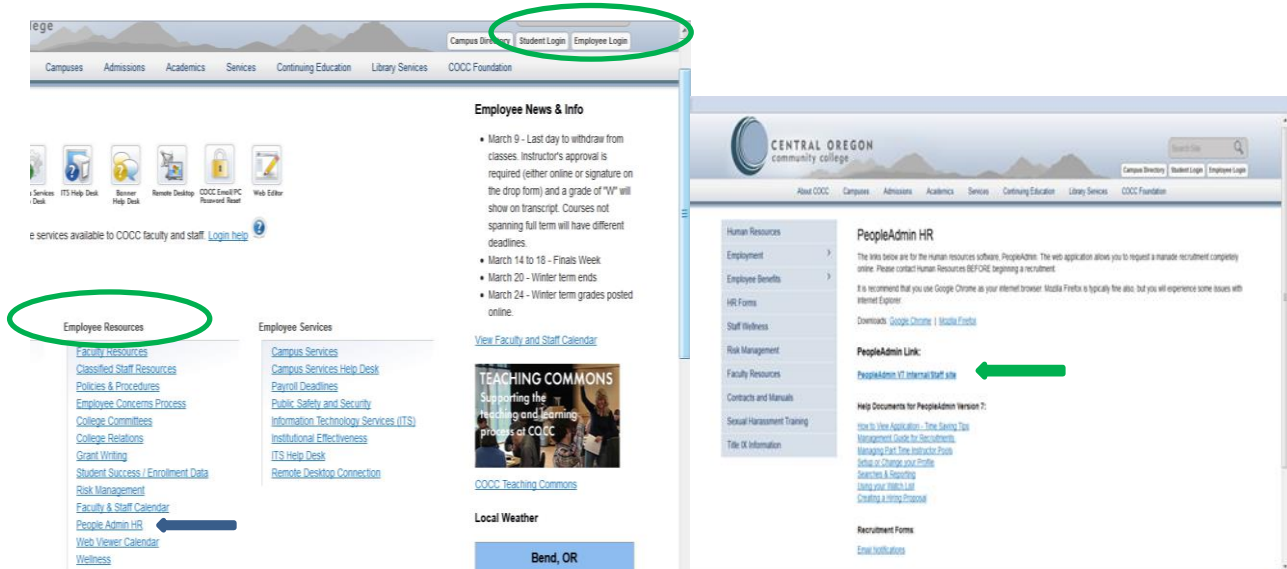
BEFORE GETTING STARTED IN PEOPLEADMIN

1. Contact Human Resources to discuss the upcoming recruitment to agree on details such as the opening and closing dates. **If this is the first time you have started a recruitment using PeopleAdmin, schedule a 30 minute session with HR for training.**
2. Provide a current and approved **job description (JD)** to Human Resources. If no changes have been made to the JD on file with HR, no new submission is needed. JDs can be found on the N drive at **N:\Group Folders\Job Descriptions**.

The COCC web page that serves as the primary resource page for PeopleAdmin (site link, help documents, etc) can be found at **COCC Home/Employees/Resources/PeopleAdmin HR**. PeopleAdmin works best using Google Chrome as the internet browser. There is a link to download Google on the PeopleAdmin resource page.

LOGGING IN TO PEOPLEADMIN

As a Hiring Manager (HM) or Committee Chair (CC), you will log in to the PeopleAdmin System with your unique username & password. Initially, your user name is the same as your COCC user name and your password will initially default to your user name and then you will be prompted to change it. (Example: username: gsmith / password: gsmith).

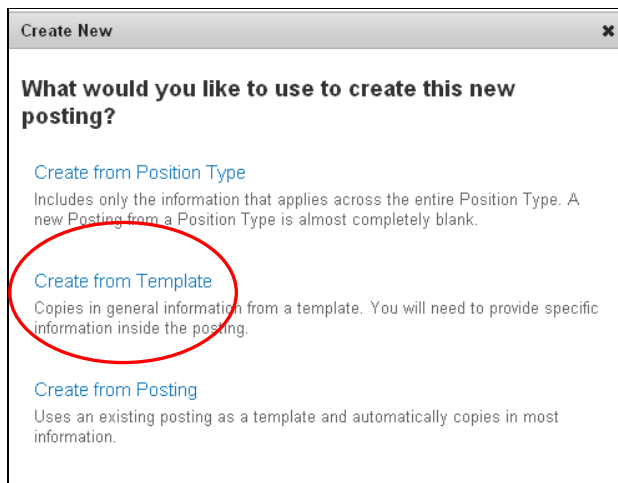
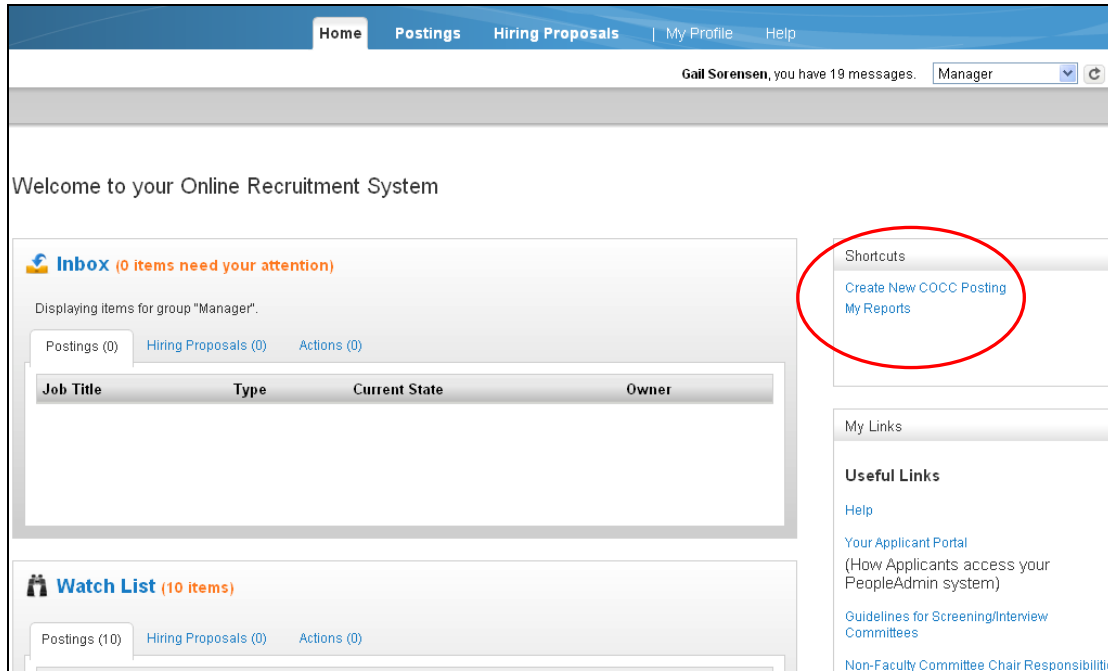


CREATING A POSTING

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Once logged in, you will be able to **Create a Posting** in one of 3 ways: (1) from **Template** (please use a template unless HR instructs you otherwise); (2) from **Posting** (if a prior recruitment for the same/similar position exists you may recycle); or (3) from **Positing Type** (from scratch; when no applicable template or previous posting exists).

From the Home page (Home Tab) you will see an **Inbox** for any postings you have in draft or that have been forwarded to you for approval. In your **Watch** List box you will see any postings you indicated you wanted to watch (refer to help doc on watch lists). To create a posting, click on the link **Create New COCC Posting** in the *Shortcuts* box



When you select to *create from a template*, the template options will appear. To VIEW a template to see if it's the one you want, click on the template link (template title) or use the Action menu. **If you open a template to view it do NOT start writing over it thinking you are creating a new one – you will be overwriting the template!**

To **CREATE** a new posting using a template, select the **Actions** button/drop-down to the right on the template line and select **Create From**.

The screenshot shows a web interface for 'COCC Templates'. At the top, there are navigation tabs: Home, Postings, Hiring Proposals, My Profile, and Help. Below the navigation, there's a search bar with a 'Search' button and 'More search options' link. A 'My Templates' tab is active, showing a saved search for 'My Templates' with 8 items found. Below this is a table of templates with columns: Template Title, Created Date, FTE, Template Status, and (Actions). The 'Actions' dropdown for the first row is highlighted with a red circle, showing options: GENERAL, View Template, and Create From.

| Template Title: | Created Date | FTE: | Template Status | (Actions) |
|--|------------------------------|------|-----------------|-----------|
| Hardware/Software Engineer | June 18, 2010 at 10:43 am | 1.0 | Approved | Actions▼ |
| General ADMINISTRATIVE Template | January 27, 2011 at 06:39 am | 1.0 | Approved | Actions▼ |
| General PT FACULTY Template | January 27, 2011 at 06:39 am | <.50 | Approved | Actions▼ |
| Instructional Course Management System Assistant | January 27, 2011 at 06:44 am | 1.0 | Approved | Actions▼ |
| Full-Time FACULTY - Masters Required | January 27, 2011 at 12:22 pm | 1.0 | Approved | Actions▼ |
| General FT CLASSIFIED Template | May 20, 2011 at 08:23 am | 1.0 | Approved | Actions▼ |
| General FT CLASSIFIED Template - No Degree Req | June 27, 2011 at 10:16 am | 1.0 | Approved | Actions▼ |
| General PT FACULTY Template - No Masters Req | June 27, 2011 at 10:23 am | <.50 | Approved | Actions▼ |

The **Position Title** will reflect the name of the template when the screen opens. Be sure to overwrite this title with the real position title and select the appropriate department. Click on **Create New Posting** to bring up the posting form.

The screenshot shows the 'New Posting' form. At the top, there's a 'New Posting' header with a 'Create New Posting' button and a 'Cancel' button. Below the header, there's a section for '* Required Information'. The 'Position Title' field is filled with 'Assistant Director of Human Resources'. The 'Organizational Unit' section has a 'Division' field. The 'Department' field is a dropdown menu with 'Human Resources' selected. At the bottom right, there are 'Create New Posting' and 'Cancel' buttons.

Enter the recruitment information that is not already completed for you and/or edit as appropriate. *Note that HR will enter the salary range and job description to maintain control of these critical pieces and their standard formatting.*

- Before selecting the option to post as “open until filled” you must have approval from HR as this is not the preferred setting other than for PT Instructor pools.
- Be sure to indicate any special recruiting sites you would like to advertise on such as professional associations or list serves.
- If you do not have your committee members confirmed at this point, indicate “TBD” in the committee name line and indicate “No” in the “contacted?” drop down. Contact HR if you need assistance getting volunteers. Let HR know ASAP when you have your members so they will be included in all communications regarding the recruitment coming from HR.

Required Information

RECRUITMENT INFORMATION

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the dropdown menu and click **GO**. Proceed through all sections completing all necessary information. To submit the Posting to human resources, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting summary Page or select Posting Summary Page from the menu and clicking **GO**. Once a summary page appears, you may enter a comment to the posting (if applicable) and select the **Submit** button.

Posting Number:

Banner Position Number:

* **Position Title:** Assistant Director of Human Resources

Working Title:

* **Position Type:** Administrative

* **Length of Position:** 12 months per year

* **Work Schedule:** 8:00 am - 5:00 pm

* **Days of the Week:** Mon-Fri

* **Hours per Week:** 40

Click **Next** at the top or bottom of the screen to move to the next page in the recruitment form (Applicant Documents). The posting automatically saves when you click Next.

The next screen allows you to select which documents applicants should provide as either required or optional. Using a template, you will see some selections are already made as the standard (requires cover letter, resume, one letter, one transcript (if degree required)).

“Not Used” means this document is not used for this recruitment. **“Optional”** allows the applicant to upload these documents but they are not required. **“Required”** allows you to determine if the document must be provided (required) or if it is only optional to provide it. If it should be required, check the box; if it should be optional, leave the box unchecked.

Editing Posting

Applicant Documents Save << Prev Next >>

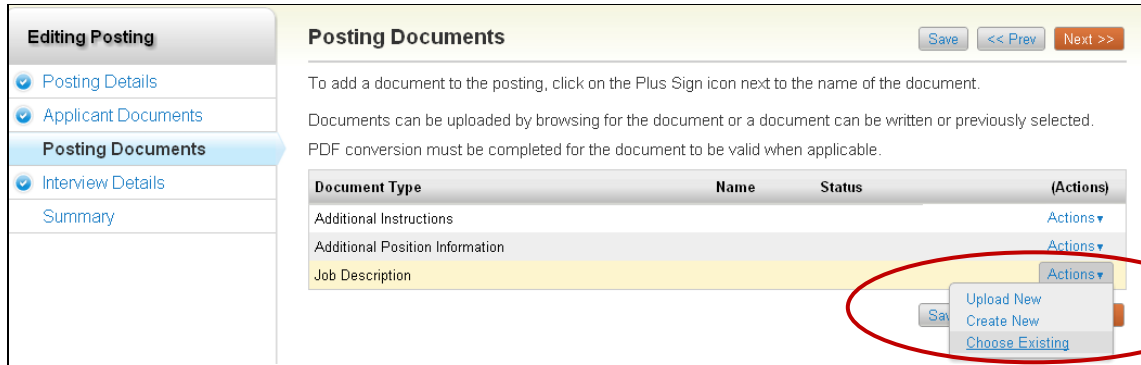
Applicant documents can be included in the application process by selecting Included? to make the documents optional and Required? to make the document(s) mandatory to complete the application process.

| Order | Name | Not Used | Optional | Required |
|-------|----------------------------|-----------------------|----------------------------------|----------------------------------|
| 1 | Resume/Vitae | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 2 | Cover Letter | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 3 | Letter of Recommendation 1 | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| 4 | Letter of Recommendation 2 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |

Select **Next** to move to the Posting Documents screen.

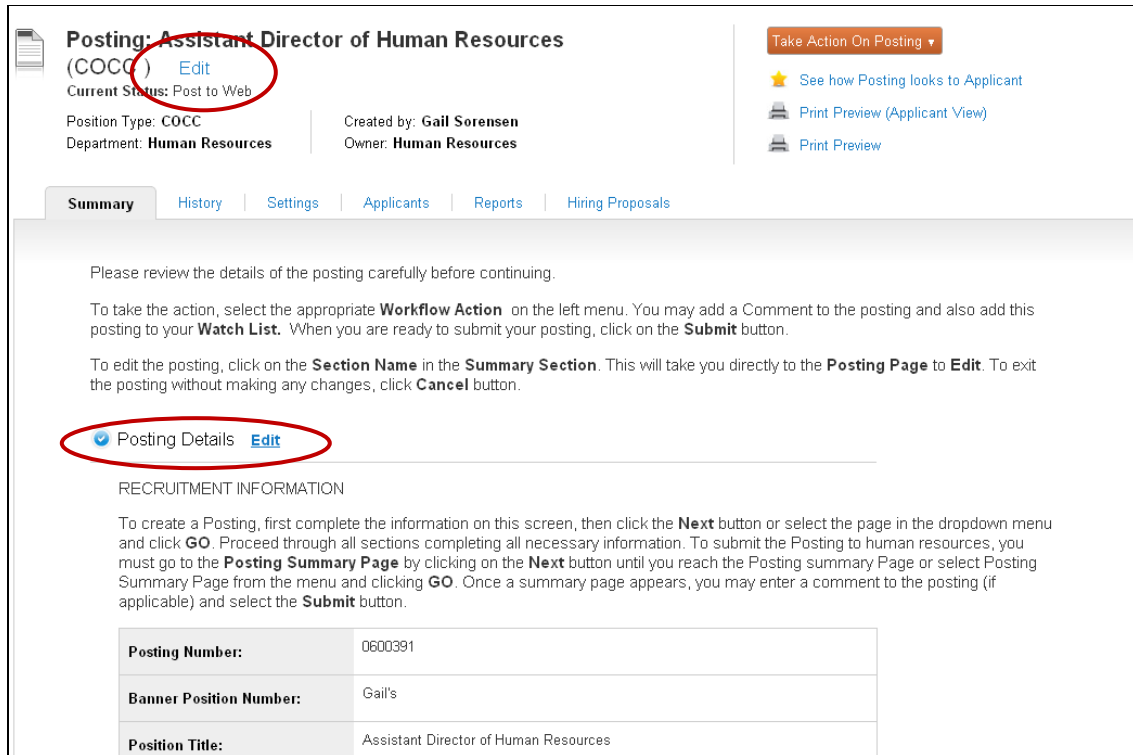
Posting Documents are documents that can be created or uploaded as part of the posting. Note however, that these are only helpful internally and the applicant can NOT see these documents.

(We have requested this be changed but as of March 2012 they are only internally visible). **It is helpful to upload the Job Description here in the Word format for easier reading. Select Choose Existing to upload a document.**



Select **Next** to complete the form and review it under the *Summary* Tab screen

From the **Summary Tab**, you may review the posting before forwarding it to the next approval level. If you need to make edits, either select the top **Edit** link or the Edit link above the section you wish to edit. Select Save or **Next** after your edits to return back to the Summary screen.

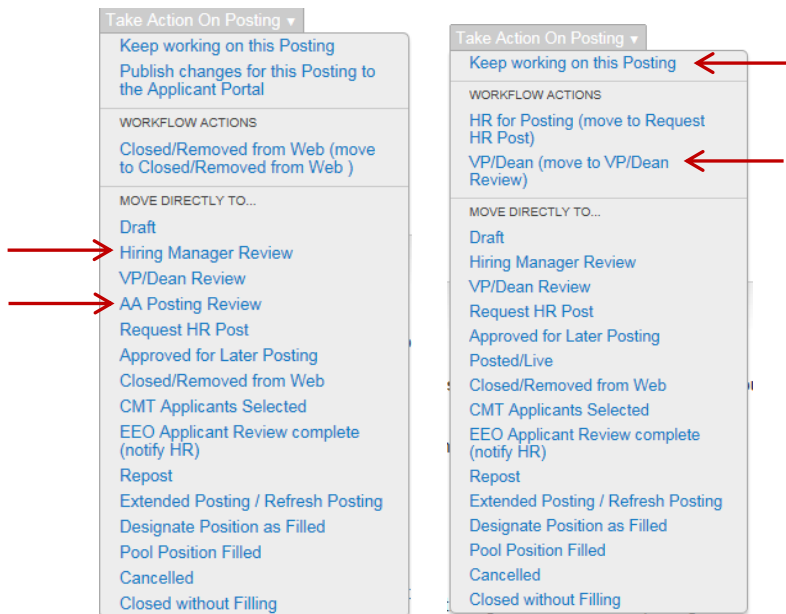


ROUTING A POSTING FOR APPROVAL

Next you will **forward the posting for approval to the next level**. If you are the Hiring Manager, you will forward to your VP or Dean who will then forward to HR (or they can return to you for corrections). If you are a VP or Dean creating or approving this posting, you will see your next routing option as *Submit to Affirmative Action for Approval*.

Click on the orange **Take Action on Posting** button/drop-down in the upper right of the posting screen. In the top section of this menu (workflow actions), the next appropriate status is indicated. If you are not done working on the form, you can save it again by selecting *Keep working on this posting* which keeps the record in *draft* status. If you, as Manager, are ready to move it forward, select the next option, **VP/Dean Review**. If you are the VP/Dean, then select *AA Posting Review for Approval* OR, select *Hiring Manager Review* if you wish to return it to the manager for changes.

Do **not** make a selection from the lower portion of this menu (Move Directly to...).



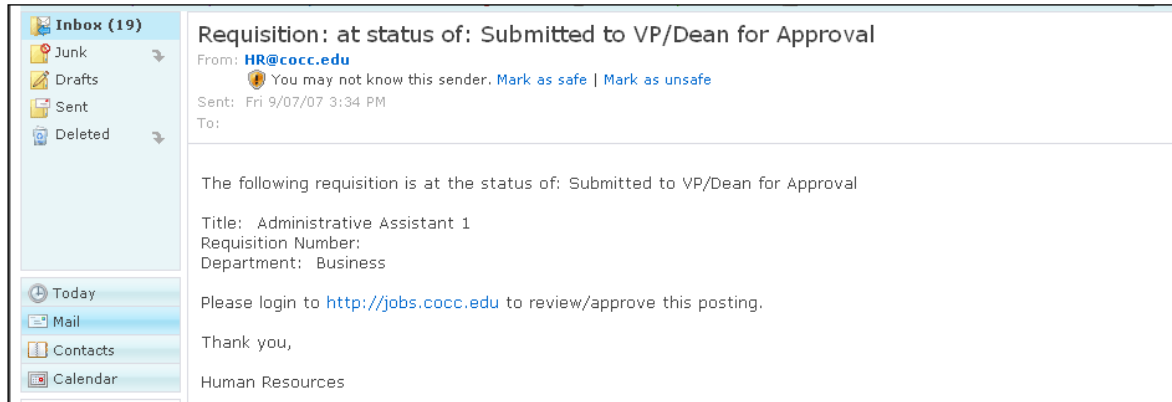
When you select the next workflow state on the menu, you will be given an opportunity to enter **comments that will appear in the email notification that goes to the next approver**. Select **Submit** when you are ready to route the posting.

You will also see an opportunity to **WATCH** the posting on this screen. If you would like the posting to show on your Home page of PeopleAdmin, check this box. Your Home page has a **Watch List** box where a link to the posting will appear. *This is really only helpful if you are a VP or Dean with oversight of multiple postings.*

The image shows a 'Take Action' dialog box. The title is 'Submit to Affirmative Action for Approval (move to Affirmative Action Review)'. It contains a text area for 'Comments (optional)' with the text 'still looking for committee members'. Below the text area is a checkbox labeled 'This posting is currently in your watch list. Uncheck this box to remove it.' which is checked. At the bottom are 'Submit' and 'Cancel' buttons.

After the Affirmative Action Officer approves the posting s/he will forward to HR to post.

As the posting is routed for approvals, those needing to review/approve the posting will receive email notifications so they know when to take action. These emails will come from HR@cocc.edu. If you have your account settings set up to also get “FYI” emails when events occur, the email message will be slightly different indicating you do not need to take action, but you are being notified of a posting status or applicant status update. See the help document on setting up your Profile for details.



Example of VP/Dean notice to review/approve posting after the hiring manager submits the posting to VP/Dean for approval.

Once HR has posted your recruitment, no action is required until after the posting closes. Postings will fall off the web site (<https://jobs.cocc.edu>) automatically at midnight of the closing date. **HR will screen applicants for minimum requirements and eligible veterans before sending a final applicant matrix to the committee.**

Refer to the Help document on the COCC PeopleAdmin resource page, **How to View Applications - special tips** when you are ready to review applications – there are critical time saving tips in the document so please read it.

OPEN TO CLOSE PROCESSES

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While the position is posted, anyone with authorized access to the posting may view any completed applications. While you can “peek” at applications before the closure date, also realize that Human Resources will not yet have completed their review to eliminate applicants that do not meet the requirements so you end up looking at unqualified applicants.

After the positing is closed, HR will review applications for minimum qualifications and eligible veteran status. HR will remove any unqualified applicants and note any veterans that must be interviewed under the veteran preference laws. Unqualified applicants will receive an email message telling them they are “no longer under consideration.”

Before the committee begins reviewing applications, they should meet to review the job description, determine interview dates/times, and meet with HR for training on process and PeopleAdmin. HR must meet with the committee at this step in the process.

After the HR applicant review, committee members will be notified that they may login and view applications by logging in using the Guest User account provided in the email from HR along with the final applicant matrix. Refer to the help document on reviewing applications for helpful time-saving tips. Note that if you print any applications, you are responsible for securing them to protect personal information. They should be shredded at the end of the recruitment.

INTERVIEW TO HIRE PROCESSES

The committee will meet again and determine who they will interview. The Committee Chair will then take the following steps within PeopleAdmin:

1. Update the **applicant workflow states** to one of three options: **Phone Interview Pending**, **Interview Pending** or **Alternate**. All other applicants remain in their current workflow state of “application received.”

From the **Applicants Tab** in the posting, select the candidates for Interview Pending by checking the box next to their names. Then click on the upper **Actions** button above the title bar for **Move in Workflow** options. Note that most workflow states are not visible to applicants (they just see “in progress” from their account) and they receive no email communications. If a workflow state is tied to an email notification, you will see “immediate email” on the line with the name of the workflow state (see workflow screenshot below).

The screenshot shows the 'Applicants' tab in PeopleAdmin. A search filter 'Active by name' is applied, showing 52 items. The table lists applicants with columns for First Name, Last Name, Workflow State (Internal), Degree, Application Date, and Documents. An 'Actions' button is visible, and a dropdown menu is open, highlighting the 'Move in Workflow' option under the 'BULK' section.

| First Name | Last Name | Workflow State (Internal) | Degree | Application Date | Documents |
|------------|-----------|---------------------------|---|-------------------------------|--|
| Michael | Adams | Application Received | Master's, Bachelor's Degree, . | February 27, 2012 at 12:10 am | Letter of Recommendation 1, Resume/Vitae, Cover Letter, Letter of Recommendation 2, Letter of Recommendation 3, Letter of Recommendation 4 (unofficial), College Transcript 2 (unofficial), College Transcript 3 (unofficial), College Transcript 4 (unofficial), Teaching Philosophy/Evidence of Teaching Potential, Other Document 1, Other Document 2, Letter of Recommendation 3, Other Document 3 |
| Howard | Barlow | Application Received | Master's, Bachelor's Degree, Associate Degree | March 01, 2012 at 10:52 pm | Resume/Vitae, Letter of Recommendation 1, Letter of Recommendation 2, Letter of Recommendation 3, Cover Letter, College Transcript 1 (unofficial), College Transcript 2 (unofficial), College Transcript 3 (unofficial), Teaching Philosophy/Evidence of Teaching Potential, Other Document 1, Other Document 2 |

The screenshot shows the 'Editing: Workflow States for 1 Applicant' dialog box. It has a 'Change for all applicants' checkbox and a dropdown menu for 'Select a workflow state'. The dropdown menu is open, showing options: Interview Pending, Alternate, PT Pool - Remove - No Longer Under Consideration (immediate email), Recommended for Hire, Active-Future Consideration (immediate email), Phone Interview Pending, and Not Approved for Hire. Below the dropdown is a table with columns for Applicant, Current State, and Reason. The 'Save changes' button is highlighted.

| Applicant | Current State | Reason |
|---------------|----------------------|--------|
| Rachel Visser | Application Received | |

Workflow states available to Managers – select the appropriate workflow and Save Changes

2. Complete the **Interview Details** section to request interviews be set up by HR. From the **Summary Tab** in the posting, scroll to the very bottom and click the **Edit** link to enter the Interview Details information. **Save** the posting.

| Interview Details Edit | |
|--|---|
| Interview Details | |
| Additional Comments: | |
| Presentation Topic: | |
| Interview Dates and Times: | Phone Interviews 3/21 12:30 – 3:00 p.m. We already set up rooms and times for 3 interviews with a 4th as tentative. The times are Monday 4/2 10-1:30 Max Merrill Wednesday 4/4 10:00-1:30 Max Merrill Friday 4/6 10:00-1:30 Max Merrill Monday 4/9 10:00-1:30 Max Merrill This is tentative. We don't know if we want to bring in 3 or 4 until we do the phone interviews. |
| Include length of Interview. | |
| Room Preferences: | Max Merrill Room |
| Alternate Dates and Times: | |

3. Update the **Posting status** (Take Action on Posting drop down) to **CMT Applicants Selected**. This status change will notify Affirmative Action to review the candidates selected against the entire applicant pool before interviews are finalized. The AA/EEO Officer may question the committee on their selections or non-selections and may ask the committee to interview an additional applicant. Selected candidates will never be removed by the AA/EEO officer, only additional candidates added.

| Take Action On Posting ▾ |
|---|
| Keep working on this Posting |
| WORKFLOW ACTIONS |
| CMT Applicants Selected (move to CMT Applicants Selected) |
| MOVE DIRECTLY TO... |
| Draft |
| Hiring Manager Review |

4. **After interviews and reference checks** are completed, and the committee is ready to recommend a candidate for hire, the Committee Chair will update the selected candidate's workflow state to **Recommend for Hire** in People Admin (refer back to step 2 instructions to update the workflow). This status will notify HR to start the **required criminal history check**. *Don't log out until you've completed step 5.*
5. Open the Candidate's applicant record to start a **Hiring Proposal**. **The proposal needs to be completed and approved before an offer can be made to the candidate.** Follow the instructions below to create the proposal.

CREATING A HIRING PROPOSAL

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1. From the list of applicants in the posting, click on the successful candidate's name (link) to open their applicant record. As noted in steps above, under the "New State" dropdown menu, choose "**Recommend for Hire**" and hit "**Save Changes**". (The applicant workflow state must be *Recommend for Hire* or you will not see the link to create the proposal.)

Editing: Workflow States for 1 Applicant

Change for all applicants: Select a workflow state...

| Applicant | Current State | New State | Reason |
|----------------|-------------------|---|--------|
| Michael Asplan | Interview Pending | Select a workflow state... Recommended for Hire Active-Future Consideration (immediate email) PT Pool - Remove - No Longer Under Consideration (immediate email) Alternate Not Approved for Hire | |

Save changes or Cancel

2. In the upper right corner of the applicant record you will see some options. Click on the link for "**Start Hiring Proposal**". Then click on the "**Start Hiring Proposal**" button.

Take Action On Job Application

- ★ View Posting Applied To
- ★ Preview Application
- + Start Hiring Proposal

Postings / ... / Applicant Review / Angelina Ptomey (Recommended for Hire (Immediate email)) / New Hiring Proposal

Starting Hiring Proposal

Applicant: Angelina Ptomey

Posting: Computer Lab Coordinator/Test Administrator, Deer Ridge Correctional Institution

Start Hiring Proposal or Cancel

3. **Enter the appropriate information into the form.** Note the form is generic for all position types, so skip fields that do not apply to your position type (administrative, classified, faculty). You will see that many fields are already pre-populated from the applicant and posting records so much of the work is already done for you. Click **Next** when you have completed the form and it will take you to the "Summary" screen.

Editing Hiring Proposal

Hiring Proposal Save Next >>

[Check spelling](#) ▼

Hiring Proposal

Posting Number:

Position Type:

Position Title:

First Name of Candidate:

Last Name of Candidate:

Supervisor Name:

Faculty Rank Detail:

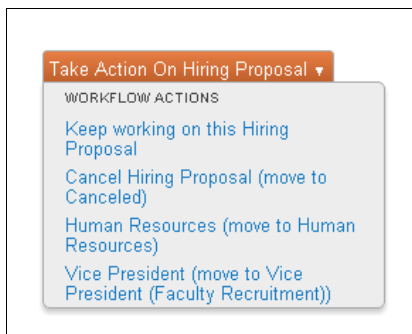
Faculty Step Detail:

Salary Level:

Recruitment Type:

FTE:

4. In the *Summary* screen you can review what you entered and make changes to the form. To make changes click on “**Edit**”. If you are ready to forward for approval, click on the orange “**Take Action**” menu. Select the next appropriate approval level.
 - a. If this is an Administrative or Classified hire, select **Human Resources** as the next approver.
 - b. If this is a Faculty hire, select **Vice President**. (For faculty hires, the VP will be notified to review/approve the hire and forward to HR for final processing.)



5. Congratulations, you have completed all steps in PeopleAdmin to complete the hiring proposal process! Once your proposal has been approved, the background check will be initiated. HR will notify you when the background check is completed and will let you know if an official employment offer can be made. This will close the recruitment process.